Project Kickoff Meeting Instructions

The project kickoff meeting is the most important meeting that you will have for your project. In addition to officially starting up project team activities, a kickoff meeting orients a new project team to the business reasons for the project and jump-starts team work with a common understanding of goals and near term work. The meeting can run anywhere from two hours to a full day depending on the size of the project and how much group time you want to spend on several project kickoff discussions and related deliverables.

In this document, we have included an example agenda for holding a kickoff meeting for a new project, along with detailed guidelines for preparing for and running this intense team session.

The agenda template identifies who should attend, objectives of the meeting, and agenda items with owners/facilitators and timeslots.

The agenda is constructed in such a fashion as to allow for it to:

1. First provide a time for the group to cover the business rationale for the project,
2. Allow the team to create a project charter or vision document together,
3. Allow the team to discuss other key project areas:
    - Scope
    - Requirements
    - Implementation Alternatives
    - Risks
    - Costs
    - Resources Needed
    - Schedule.

The team captures all this information and kick-starts the teamwork by translating it into a draft of the team roles and responsibilities lists, budgets, risk lists and project timeline.

This will allow the kickoff meeting to accomplish the following:

- Gets a team aligned very quickly to the business objectives for a project, so all subsequent team work is firmly grounded on a common understanding.
- Creates team energy around the common goal and an initial understanding of how each team member fits.
- Ensures that any issues and misunderstandings regarding project objectives get aired right away.
- Ensures that the team "gets to work" and makes real progress together quickly.

Team members leave with a solid group understanding of what the project must accomplish and how it will proceed immediately after the meeting.

How to Use It

1. Use the agenda on the following page to plan your kickoff meeting.
2. Determine what materials to bring to the meeting to support the discussion and which project documents will be drafted together in the meeting.
3. Work with your executive sponsor to set meeting goals and expectations regarding their role.
4. Determine who should be invited to ensure team-wide understanding of the project's goals and constraints, so the team can hit the ground running after the meeting.
5. Publish an agenda ahead of time.
6. Follow up immediately after the meeting by publishing drafts of any project documents (such as risk lists) created during the meeting.
7. Publish action items and schedule the next team meeting to keep momentum going.

Preparing for your kickoff meeting

The following are detailed steps to use in getting ready for your Project's Kickoff Meeting:

1. **Identify the Project:** Identify the project that you are going to hold the kickoff meeting for. NOTE: For projects already underway, consider whether they could benefit from getting everyone re-aligned to the business objectives. If so, this kind of meeting is in order.
2. **Set the Objectives for the Kickoff Meeting**: Articulate the objectives for the meeting.

3. **Draft an Agenda for the Meeting:** Create a draft agenda by editing the template. It includes not only the agenda items, but also an introduction listing specific objectives of this kickoff and the project deliverables you intend to have when you exit the meeting.

4. **Meet With and Prepare the Project's Executive Sponsor**:

    - Work with the project's executive sponsor ahead of time. Review the draft agenda and get their buy-in to having this kind of meeting, and to its goals.

    - Set expectations about what they'll present or brief to the team (if anything). It is often very powerful to have the responsible executive personally voice to the team why this project is important and what it must accomplish. Help them understand their role in clearly articulating the business goals of the project and the priorities the team should be observing.

NOTE: If you think that other functional managers may resist allowing their team members to spend hours of their time in a kickoff meeting, enlist your executive sponsor to get support for this meeting from those managers. The team impact of this kickoff meeting will be undermined if all key cross-functions are not represented.

5. Determine who should be in the meeting:

    - Executive Sponsor: It is essential to have the executive sponsor attend at least the first portion of the kickoff meeting, where the business goals of the project are discussed. If the Executive Sponsor cannot attend, consider canceling until such time that he/she can be in attendance.

    - Stakeholders or Influencers: Consider who will be affected by this project and who could influence it, positively or negatively. You may want to have key stakeholders or influencers attend at least the first part of the kickoff meeting, where project goals are discussed.

    - Core Team Members: At least one representative from each cross-functional area whose significant participation is needed on this project. This includes not just people doing key development or creation work, but those whose work is necessary for the project to be complete, or who take whatever the project creates and support it, use it, etc.

    - Outside Partners: If any outside group is helping create the project deliverable, they can be included if the appropriate non-disclosure agreements are in place, since the team will get into discussions of the business rationale for the project. Alternately, the partners can be included in a subsequent meeting where the results of the kickoff are reviewed. This gives the team a way to include them very early in meaty discussions of the project's goals without involving them in potentially sensitive, open, and even initially contentious discussions of the business objectives.

6. **Prepare Materials:** Prepare draft of your Charter or Vision write-up for your project rather than creating it from scratch (which would take longer). The project manager and a couple of key contributors can write down what they already know about the project objectives. NOTE: Make sure that you position the draft as just that. It is simply designed to get discussion going. It is important that the draft team not come into the meeting feeling that they are being presented with the project details. This would be totally counterproductive to the goal of the kickoff meeting.

7. **Identify a Facilitator:** This kind of meeting needs a facilitator, someone whose role is to keep the discussions on track, ensure the meeting objectives are being met, and make sure everyone in the room is engaged and being heard.

8. **Identify Recorder:** Identify a recorder who will take down draft document content and record team decisions. Recording can be done on white boards, flip chart paper, or into a computer if a projector is available (the team needs to be able to see the results of their discussions).

NOTE: it is NOT optimal for a facilitator to be taking notes into a notebook or glued to a computer screen. They must be able to be up and about and making eye contact with the group.

Running Your Meeting

Follow these steps to set the right expectations for the meeting and get everyone comfortable as to what is going to happen and how they should participate:

1. Open the Meeting: Open your meeting by telling the team the purpose and the approach that is going to be taken. Tell them why the meeting is taking place, the reasoning behind the focused kickoff session, what will be covered, what the session is expected to deliver and, finally, why the session is "*X*" hours long.

   Present a slide like the following as a visual aid:

   Project Kickoff Meeting

   - Purpose
   - Start the project with a business and customer focus
   - Get the team aligned, from the start, on "why we are doing this"
   - What: Cover in one session, with entire team:
     - Project Scope
     - Risks
     - Timeline and Business-Critical Milestones

        - Team Roles List Roster
    - Who:
        - All core team members
        - Project manager
        - Project sponsor
    - How and how long:
        - Create drafts together in the room for some documents
        - Drafts of 2 key deliverables—straw man—team will review, discuss, update
        - 4 hours so we have time for good first drafts and reviews and discussions—air all issues, questions

2. Set the Ground Rules: Discuss the type of participation expected. Let them know that this is a working session in many ways, not a presentation by the project manager or sponsor.

3. Create a Team Roles List:

    - Introduce the sponsor and explain the sponsor’s role on the project, and what the sponsor will do in the meeting. Introduce the participants that will be working with you during the course of the meeting. Have the team members introduce themselves, what department they’re representing, and anything they know about their intended role on the project, or questions they may have.

    - Have the recorder capture this quickly and informally as people introduce themselves. Note issues or questions team members express; they will be addressed later once the project’s goals and scope have been discussed.

4. Create/Review the Project’s Charter or Scope:

    - Introduce either a draft Project Charter or an outline for the sections of a Project Charter that the team will fill in through their discussions.

    - Go over (or preferably have the sponsor talk about) the project goals, then have the team start filling in the sections of the charter or reviewing the sections of the draft brought to the meeting. This should include capturing who the customer is, how the project is intended to benefit them and the company, and what is most important.

5. Discuss the Project Approach, High-Level Work Breakdown and a Rough Timeline:

    - Group discussion: Given what needs to be done on this project, how should the project work be broken down into major phases and/or activity blocks? What cross-functional work is there?

    - How might this project play out across time? The team can layout the major phases of work on a timeline to sanity-check the requested schedule. For example, if there is a development phase, then a test phase needed, roughly how much time might be needed for testing this kind of project? If you back up from the end date and allow that much time for testing, is adequate development time left?

    - Do we already see issues meeting the project goals? The work breakdown and timeline exercises can quickly show teams where the schedule vs. scope definition for the project is out of whack or the resources supposedly necessary for the project are not enough for the work the team has identified. What's key here is that the team can spot possible issues in the first team meeting—not after weeks of laborious planning work!

    - Capture that information to create a draft WBS and high-level timeline to feed the eventual project schedule. Capture as issues any scope, schedule or cost disconnects the team uncovers.

6. Identify Risk: The team can brainstorm risks related to the schedule or to unknowns about specific work or features or customer needs. They should first categorize each risk, identifying:

    - The probability of it occurring

    - The impact if it did occur

    - The mitigation plan to prevent the risk from happening

    - The plan if the risk does occur

7. Identify the Next Steps for the Team: Based on where the team gets on all this kickoff work, set actions for everyone to pursue after the meeting and decide the focus for the next team meeting.

8. The team should have at this point a better idea in general of what they need to do simply by virtue of the rich and detailed discussion and actual teamwork. Since this meeting has spent tremendous focused time on goals, major project parameters and uncovering issues, the team also can leave with a clear sense of priorities.

9. Ask them if we find a major schedule issue, will we relax the desired project deadline or give up some features.

10. If the answer to the question is “Yes”, then let’s address the issue further with the sponsor immediately. No need to take the team into detailed planning or detailed work for something that might get dropped to hold a desired schedule!

The Follow-Up

The follow-up to the Kickoff Session is critical for keeping the team engaged and ensuring the great points raised all get follow through.

1. Publish Results: Publish the results of the team’s work. You will have generated drafts of several key early project documents including the Vision, Team Roles List, Risk List and Action Item List. Be sure to explicitly record any key decisions reached about scope and priorities.

2. Follow up on issues and with key individuals: Because this type of kickoff delves into business objectives—and possible project tradeoffs to meet schedule or resource constraints—sometimes the discussions can get heated! You may find places where team members are not in agreement yet with how the project should proceed or which goals are most important. The team attempts to resolve as many as possible in the kickoff meeting, but very often issues have to be logged and taken away for outside work.

3. In addition to taking follow-up actions on any issues raised, the project manager can also follow up with any individuals who got particularly upset or seemed to feel their objectives or opinions were in conflict with the team. The kickoff meeting is a great chance to get to know what’s important to your team members and harness their opinions to get the project on the right track.

4. Hold the next team meeting: Schedule and hold the next team session for the project and bring the actions and issues from the Kickoff Meeting. Show continuity. Show that opinions and issues raised are being addressed. If any issues raised at the kickoff have been resolved, bring that resolution and review it with the team.

Administrative Information

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